

ServTraqLITE Features

September 2008

Basic Data Storage and Reporting Application for California Energy Service Providers
Funded by CA Department of Community Services and Development

The Application

- The application is “user friendly” and easy to navigate.
- The application stores its data in a SQL Server database.
- Distribution of the application is done by administrative staff that has local administrative privileges with a standard Windows installation package.
- Configuration of the application uses standard XML methods.
- User-centric online help is available through the standard “F1” key.
- Database backup, backup file maintenance and database index and integrity maintenance utility integrated with the application.

Security Features

- User authentication provides access to the application.
- Password encryption is utilized.
- Activity permissions assignment limits users to the features of the application that they are authorized to use.
- Designated administrators can add, edit, and remove the accounts of other users. Each user account includes feature-specific authorization settings.
- Users can be divided into “user groups” for the reporting and processing convenience of the administrative staff.

Cash Assistance Record Entry Features

- Support for multiple search methods. Minimum search conditions must be met to add a customer or an application.
- Designated users can add, edit, and remove customers, applications and related data.
- Designated users can generate a database transfer of type to be determined.
- Support for the data elements agreed upon in the data dictionary.
- Support for saving rejected application records, updating/correcting records, and retransferring records.

Weatherization Job Entry Features

- Support for multiple search methods. Minimum search conditions must be met to add a customer, eligibility (application), dwelling, or job.
- Designated users can add, edit, or remove:
 - Customers and related data.
 - Applications and related data.
 - Addresses/properties/
 - Jobs and related data/
 - Job details (measures and reimbursement entry).

Contract Information Maintenance

- Administrators can add, edit, and remove:
 - Contracts, programs, sub-programs and related data.
 - Contract/sub-program eligibility data.
 - Sub-program payment amounts.
 - Sub-program measures/reimbursement amounts.

Reporting – To CSD

- Cash Assistance expenditure report shows active contracts/sub-programs and to-date expenditures, percentages, and remaining allocations for each subprogram.
- Intake form report shows cash assistance application details as entered into ServTraqLITE.
- Weatherization report shows monthly activity. This report will mimic the EARS system by outputting both weatherization expenditures broken down by measure, and household demographics. The report can be run by a specific report period or as a contract term to date summary.
- Jobsheet details report shows dwelling/job level weatherization activity for the client file.
- Weatherization sub-program expenditure report shows active contracts and sub-programs, expenditures to-date, percent expended, and remaining allocation.
- Contract demographic report details energy burden, vulnerable population members, income level (poverty group), and agency defined items summarized by household.